STRATEGISTS, THE YOUNG SAMURAI: IDENTIFYING THEIR CHARACTERISTICS

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ABSTRACT

The role of a strategist is one that has been under-represented in management research and literature. This paper investigates reasons for this lacunae and why it should be addressed. The paper explores the differences between leaders and strategists and presents a set of characteristics that strategists' possess. Importantly, the paper does not propose that the characteristics are traits or behaviours as these categorisations suggest a particular view of the subject that might be divisive at this stage. There is, however, consideration of whether the characteristics presented can be appropriated and even taught. The characteristics identified are principally derived from secondary research but also draws on primary research. The paper details the development of leadership theory and how that has informed the approach taken in this work.

It is recognised that the approach adopted has some weaknesses, but it is hoped that this paper will at least engage the academic community and practitioners with this important subject and result in more detailed research and organisational activity.

Key words: Strategist; strategic management; leaders; leadership

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Introduction

McNulty and Pettigrew (1999) stated, "To understand strategy we need to know more about strategists." (p.47) This quotation might appear self-evident, however, if the literature on strategy and strategic management is examined, this relationship is rarely made. This paper seeks to develop of appreciation of the notion of a strategist. In the context of business there have been a plethora of texts on strategy and strategic management, for example Selznick (1957), Chandler (1962), Ansoff (1965), Porter (1980), Mintzberg and Westley (2005) and Johnson, Scholes and Whittington (2005), to name but a few. There are, nevertheless, as Whittington (2002) and Mantere and Whittington (2007) found very few texts analysing, in any depth or with academic rigour, strategists themselves. Handel (2001) suggested that numerous biographies exist on great strategists from a range of disciplines, for example military (McNeilly 2001) and business (Welch and Welch 2005), but these tend to be anecdotal and descriptive.

Often the notions of leaders and leadership are confused with the concepts of strategy (or strategic management) or strategists. There is a preponderance of literature and research on leadership and a corresponding amount of literature on its agent, leaders. In terms of strategic management, however, there is a lacunae in terms of its key agent, strategists. A cursory search of Amazon's book offering (26th January, 2012) shows that it has 39,299 texts on leaders compared with a mere 1,006 on strategists. In a corresponding search of Business Source Premier (also known as EBSCO) on the same day found that it has 24,335 journal articles on leaders and only 941 on strategists (peer reviewed, since 1943). In both collections many texts and articles will not be relevant to business and management, but the relative foci of writers on the topics are clear.

This paper argues that strategists should be regarded as a distinct and crucial instrument in organisational development and as such should command as much interest as leaders and leadership from academe and practitioners. As Mintzberg, Ahlstrand and Lampel (1998) stated,

> "*If we are really serious about understanding strategic vision as well as how strategies form under other circumstances then we had better probe into the mind of the strategist*." (p.8)

Identifying what might constitute a strategist is important for a number of reasons. Firstly, it is important to identify those that influence the fundamental decisions and future direction of organisations. Secondly, although it is impossible to obtain accurate data, the sum of organisational resources expended on leadership training is significant. It is arguably the largest single area of expenditure in organisational development. How much, however, is spent on programmes that specifically develop of strategists? Potential leaders are fast-tracked to senior positions in both public and private sector organisations. Strategists do not appear to be awarded formally recognised accelerated access to positions where they might be able influence the development of organisations. Lastly, there appears to be little or no examination of

the environment in which strategists can develop strategy. There is consideration of how to develop strategy, but this tends to be couched in the thinking and literature on leaders and leadership. De Wit and Meyer (2005) suggested that it is essential that there is an understanding of what is going on in the minds of managers when they make strategic decisions and act in particular ways. De Wit and Meyer (2005) described the mind of a strategist as a "black box" (p.27). They suggest that, "Grasping how managers shape their strategic views and select their preferred actions can be used to develop more effective strategy processes." (p.27)

The paper is a conceptual piece of work. The paper will suggest particular characteristics of strategists, but there is no empirical evidence to support the relationship suggested. Using extant literature, examples and the author's understanding of the subject area, including interviews with academics and business leaders (or strategists) it is intended that a convincing argument will be presented. The characteristics identified could be considered as arbitrary, however, there are bodies of literature supporting their inclusion and it is argued that they are consistent with the definitions of strategy and a strategist presented in this work.

The paper begins with an overview of the proposed difference between strategists, leaders and other organisational functions. It then explores different approaches to understanding leaders and leadership as this informs the approach adopted in this paper. The paper then goes on to examine the literature on strategists and will suggest a set of characteristics that might be associated with this role. Concluding thoughts will then be presented.

Are strategists different from leaders, managers and others in an organisation?
A strategist is defined in this work as a strategic thinker and communicator, someone who critically and holistically reflects on the long term and fundamental issues facing an organisation. Strategists are the cerebral core of an organisation. The description of a strategist presented here draws upon a widely regarded definition of strategy presented by Johnson et al (2005),

> *"Strategy is the direction and scope of an organisation over the long term, which achieves advantage in a changing environment through its configuration of resources and competences with the aim of fulfilling stakeholder expectations*." (p.9)

It should be noted they do not describe strategic management or strategists in their definition. When searching for literature on the subject of strategists whatever specific references made to strategists found are almost always located within work on leaders and leadership. Leadership is one of the most researched and written about subjects in management. Northhouse (1997) claimed that the topic "fascinates" (p.1) people and corporations. Northouse (1997) stated, "There are a multitude of ways to finish the sentence, 'Leadership is….' " (p.2). Daft (2002) identified over three hundred and fifty different definitions of the term. In this work, however, leaders are simply defined as individuals who have followers. Leaders and strategists are not be mutually exclusive concepts. Leaders can be strategists. Few would argue against the assertion that an individual like Bill Gates exhibits the characteristics of a leader and strategist as defined in this paper. Other leaders might not necessarily be their organisations' strategists but they might act as figureheads that communicate an

organisation's strategy and persuade others to enact those strategies. Undoubtedly, strategists will have to be able to communicate and persuade leaders, but their role is not primarily about persuasion and ensuring that strategies are implemented, this is the task of leaders and managers.

A question that some academics, and perhaps practitioners, ask is whether strategy is anything different from everyday management (Mintzberg 2004; Feldman 2005)? Ergo, are strategists anything different from managers. Often strategy and management get confused and it is difficult to detach the operational from the strategic. Johnson et al. (2005) were unequivocal in their belief that, "Strategic management is different in nature from other aspects of management." (p.15) They view strategic management as dealing with the complex, the ambiguous and unexpected. Therefore, a strategist will need a set of qualities that addresses this type of environment and organisational setting.

The figure below (Figure 1: Strategist) identifies a range of players that are involved in the process of strategy creation and implementation. These are, again, not mutually exclusive, they may overlap or be, in fact one person. They range from decision makers to workers.

[Insert Figure 1: Strategists – about here]

In academic research a wide variety of approaches to understanding what constitutes leadership have developed (Bass 1990). These are now briefly reviewed as they have informed the approach adopted in this paper.

The Trait Approach

This paper explores whether strategists exhibit recognisable qualities or characteristics that might be identifiable in a range of situations. This approach is firmly embedded in research into leaders. There has been captivation in what qualities distinguish an individual as a leader as far back as writers such as Plato and Plutarch. This approach to examining leaders has become known as trait theory, which was a dominant theme in research into the subject (Zaccaro, 2007). This method of analysis grew out a research approach in the nineteenth century into leadership which became known as the 'Great Man' approach. Writers such as Nietzsche, James and Galton and Carlyle espoused the virtues of great men (and some women) (van Wart 2003). Studies by Agryis (1955) and Mahoney et al (1960) concentrated on the identification of personal traits of successful leaders. Jago (1982) stated that,

> *"It is possible to view leadership primarily in terms of relatively stable and enduring characteristics of people. Leadership can be viewed as a trait (or set of traits) distributed in some way among the population. In this sense, leadership is viewed as a measurable and quantifiable property possessed in different amounts by different people."* (p.316)

Daft (2002) described these properties as characteristics. The application of advanced psychological analysis in the 1940s and 1950s allowed forms of checklists of the characteristics to be developed. A range of leader traits have been identified over the years, however, certain traits or categories of trait have been generally examined

including: demographics (e.g. gender, age, education), task competence (e.g. intelligence, conscientiousness), or interpersonal attributes (e.g. agreeableness, extraversion) (Derue, Nahrgang, Wellman and Humphrey, 2011). In the trait approach to leadership the 'essence' of the leader is all-important, the context in which he or she operates is not. Therefore, organisations that adopt this approach focus on selection of their leaders rather than the development of individuals (Grint 2001).

Issues with the trait approach: There have, however, been a number of serious criticisms levied at the use of the trait approach in research on leaders. Daft (2002) believed that the trait approach tried, rather unsuccessfully, to identify the common traits that great leaders posses. Stogdill (1948; 1963; 1974) found that the significant research effort in trait approach failed to find any traits that would guarantee that the individual would succeed as a leader. Fleenor (2007) also noted that researchers found very small relationships between identified leadership traits and effectiveness. Fleenor proposed that many early researchers found no differences between leaders and followers with respect to their leadership characteristics, with some even finding that individuals who possessed these leader traits were less likely to become leaders. The multitude of variables identified in trait studies had low reliabilities in terms of leadership effectiveness. It was found by researchers such as Bass (1985) and Kirkpatrick and Locke (1991) that the relationship between traits and leadership is moderated by situational factors. Another key criticism of the trait approach is that the research undertaken was not grounded in strong and reliable research. Yukl (1989) suggested that this tendency reveals the inherent weaknesses in trait approach, in that there are no guidelines to indicate which trait will be appropriate or prominent in a given situation. Another criticism of the trait approach is that the method did not acknowledge the significance of followers and their traits and behaviours in the leadership process (Dansereau, Graen, & Haga, 1975; Graen & Cashman, 1975). Finally, researchers such as Kakabadse & Kakabadse (1999) and Bass (1990) argued that leadership trait research did not take into account the impact of culture, particularly in an era of globalisation.

Alternatives to the trait approach: Out of the criticisms of the trait approach a number of alternative perspectives and methods emerged. Stoghill's 1948 meta study of the trait literature identified the situational importance in leadership research, although his later research concluded that certain traits, for example, aggressiveness and independence, contributed to effective leadership. 'Style' and 'behavioural' approaches to leadership research shifted emphasis away from the personal characteristics of a leader to their style of leadership (Ogbonna and Harris 2000). Daft (2002) stated,

> *"The behaviour approach says that anyone who adopts the appropriate behaviour can be a good leader…Behaviours can be learnt more readily than traits, enabling leadership to be accessible to all"* (p.50)

Fleishman and colleagues (Fleishman, Mumford, Zaccaro, Levin, Korotkin, and Hein 1991) identified sixty-five distinct classifications of leader behaviour and succeeding research have found that the number of classifications, typologies and theories have proliferated (Avolio, Sosik, Jung and Berson 2003; Pearce Sims, Cox, Ball, Schnell, Smith and Trevino 2003). Derue et al. (2011) believed that a consistent theme in the

leadership literature is that behaviours can be fit into four categories: task-oriented behaviours; relational-oriented behaviours; change-oriented behaviours; and to what they refer to as passive leadership. Jago (1982) stated,

> *"... it is possible to focus on observable leader behaviors rather than on inherent traits. From such a perspective, leadership exists primarily in the actions of the leader. Leadership is expressed in terms of overt behavior patterns rather than in terms of some intrinsic property or characteristic."* (p.316)

The situational approach attempted to address the perceived major weakness in the trait and behavioural approaches, in that they ignored the importance of situational factors in the success of leadership (Fiedler, 1967; Hersey and Blanchard, 1988; House, 1971; van Wart 2003; Vroom and Yetton, 1974). The situational approach takes the same line as contextualists, in that it recognises that certain circumstances require particular kinds of leadership. Stogdill (1974) stated,

> *"The trait approach tended to treat personality variables in an atomistic fashion, suggesting that each trait acted singly to determine the effects of leadership; [while] the situational approach, on the other hand, denied the influences of individual differences, attributing all variance among persons to the fortuitous demands of the environment."* (p. 78)

The contingency approach, grew out of the frustration of researchers to identify universal leader traits or behaviours and is closely associated with the situational approach. A number of frameworks have developed that have been categorised as contingency-based, including Fielder's contingency model, Hersey and Blanchard's situational theory, path-goal theory, and the Vroom-Jago contingency model (Daft 2002). The contingency approach has as its focus the situation in which leadership occurs (Daft 2002). It postulates that particular leadership behaviours in certain circumstances will be more successful. Daft (2002) stated, "The contingency approaches seek to delineate the characteristics of situations and followers and examine the leadership styles that can be used effectively." (p.80) The approach advocates the importance of the individual's abilities and the situation in which their leadership talents are called upon (Grint 2001). Unlike the contingency theorists, however, situationalists believe that a leader will be able to modify their behaviour and actions to fit a particular situation (Grint 2001).

Why use an approach based on traits? More recent studies have, however, resurrected the interest in leadership traits (Kirkpartick and Locke, 1991; Lord, de Vader and Alliger, 1986; Derue et al. 2011) including the importance of emotional intelligence in successful leaders (e.g. Goleman, 1995; Megerian and Sosik, 1996). Fleenor (2007) links this resurgence to the development of the five-factor personality model (See: Digman, 1990) and more recent research into traits have tried to ameliorate upon the weaknesses of the method in earlier studies. Bass and Steidlmeier (1999) have promoted the use of the trait approach in transformative leadership research identifying that some leaders have the capacity to act as transformative agents because of their superior talents, morality and will.

In many ways the criticisms of the trait approach are relevant to the behavioural approach. Simply put a trait is something that someone inherently possesses and a behaviour is a form of conduct that someone exhibits. Some believe that managers (strategists) are born and not bred (Hartmann 1959). This understanding underpins the trait approach to understanding the basis of leaders. This implies that traits cannot be taught or nurtured. A number of writers have questioned the actual difference between a trait and a behaviour (See Antonakis, Fenley, and Liechti 2011; Doh 2003). Researchers such as Derue et al (2011) have attempted to integrate both trait and behavioural research. There has been a growing appreciation that management education can contribute to developing the abilities that strategists require today (Starkey and Tiratsoo 2007). It is argued here, supported by work of a number of eminent writers (Bass 1985; Drucker 1967; Liedtka 1998; Ohmae 1982) that the characteristics of a strategist can be learnt, or at least developed.

Perhaps, the paper could be considered as 'retro' in its approach, in that it could be viewed that it adopts an approach akin to the trait and behavioural approaches. Both of which it is recognised have flaws and might be considered as simplistic approaches when considering strategists. It does, however, allow initial consideration of this complex area using a reasonably familiar construct. Meng, Berger and Heyman (2011) suggests that trait research provides a benchmark for the selection of potential leaders. Fully acknowledging the problems inherent with the method, this is the view taken in this paper in relation to identification of characteristics of a strategist.

The characteristics of a strategist

So what characteristics might strategists possess? The table below (Table 1: Characteristics of a Strategist) lists the characteristics identified in this work and provides key references that support the characteristics inclusion. In the table a number of the elements are inter-related. It is recognised that this is not a comprehensive set of factors and that strategists may not require all of these characteristics.

[Insert Table 1: Characteristics of a Strategist – about here]

What follows is a brief description of each characteristic with references to supporting literature.

Holistic thinking

A number of writers have found the ability of strategists to think holistically about strategic issues is essential. Drucker (1954) and Hambrick and Fredrickson (2005) extended this notion of comprehensive thinking and introduce the metaphor of orchestration in strategic conceptualisation. Ohmae (1982) believed that the strategist must be able to identify strategic issues, which Ohmae then suggests are issues that require a comprehensive and rounded view. As Johnson et al. (2005) stated,

> "*The manager who aspires to manage or influence strategy needs to develop a capability to take an overview, to conceive of the whole rather than just the parts of the situation facing an organisation."* (p.15)

Hambrick and Fredrickson (2005) proposed that a strategist must have an integrated overarching concept of how an organisation will achieve its objectives. Bonn (2001)

suggested that, at the individual level, strategic thinking consists of three inter-related elements: a holistic understanding of the organisation and its environment; creativity; and a vision for the future of the organisation. Bonn's identification of the ability to develop a holistic comprehension of an organisation draws upon work of writers such as Kaufman (1991) and it is suggested by Bonn and others such as Senge (1990) and Stacey (1996) that the capacity to develop a holistic view relies on a systems thinking approach.

Clear intent and a vision for the future (long term view); ability to forecast – a fundamental thinker

The ability of a strategist to identify a clear intent for the organisation is suggested by writers such as Prahalad and Hamel (1990) and Liedtka (1997) as a virtue that a strategist should possess. Perhaps, a more eclectic ability in terms of identifying intent is having a vision for the future as suggested by a number of writers. Senge (1990) purposed that a vision for an organisation is a deep held belief, rather than a neat solution to an organisational problem. Champy and Nohria (2000), Beatty and Quinn (2002) and Gill (2006) proposed that formulating the long view is a fundamental function of the strategist. The ability to forecast (not predict) is linked to the ability to develop a view of the future and is something at strategists must possess (Reagan-Circincione, Schuman, Richardson, Dorf 1991). Strategy is about making decisions for the future. Bonn (2001; 2005) identified that the ability to forecast as a competence that strategists should either have or acquire. Perhaps, this ability should be considered as the capability to identify the important or fundamental issues from a holistic perspective that face an organisation.

Creative and entrepreneurial thinking (divergent thinking); break from previous patterns of behaviour

Sun Tzu highlighted the need for a strategist to deceive and surprise, whereas Liedtka (1997) focussed on the requirement for imagination. Bhide (1994) linked the concept of a strategist with entrepreneurship. This implies a more action and implementation focus than other writers have proposed. Writers have suggested that strategists should be prepared to break from previous patterns of behaviour (Chung and McLarney 1999; Cummings 2002; Kao 1997) which links to the notion of creativity in strategy. Walton (2004) posits that a strategist has many of the traits of an artist, particularly in terms of creativity. Writers such as De Bono (1996), Ford and Gioia (2000) and Stacey (1996) have emphasised the requirement for strategists to be creative so that original solutions to strategic issues can be found. Critically, strategists must escape from what Kao (1997) describe as the "...tyranny of the given …" (p.47). The ability of strategists to break from previous patterns of behaviour, particularly, where the approach was successful was also identified as important by Chung and McLarney (1999).

Cognitive ability and sense-making

When examining the facets and competencies an effective strategist requires cognitive ability, which is a function of a plethora of factors and cannot be separated as an independent variable. Human cognition can be defined as the human ability to know. Most importantly, it must be remembered that even the most blessed strategists suffer from cognitive limitations (March and Olsen 1976). De Wit and Meyer (2005) explores the issues around human cognition. Strategists develop cognitive maps, their mental models of the world (Eden 2009; Nadkarni and Narayanan 2007; Stacey

2007). These maps are developed through life experience. Formal or informal education is a significant constituent of a strategist's experience. To strategise, using cognitive maps, strategists have cognitive abilities, their mental faculties. Individuals have different cognitive abilities that may be more appropriate in different contexts. The value of an individual's cognitive abilities varies from context to context (Calori, Johnson and Sarnin 1992; Chung and McLarney). Even the greatest strategists cannot be expected to know everything, to be omniscient. As De Wit and Meyer (2005) stated,

> *"For strategists, cognitive rigidity is particularly worrying. Strategists should be at the forefront of market developments, identifying changing circumstances and new opportunities before their competitors. Strategic thinking is by its very nature focused on understanding and shaping the future, and therefore strategists must have the ability to challenge current beliefs and change their own mind. They must be able to come up with innovative, but feasible, new strategies that will fit with the unfolding reality."* (p.33)

This statement links cognitive ability with the capability of a strategist to be creative, innovative and entrepreneurial. Writers such as Ackroyd (2002), Coulter (2005), Johnson et al. (2005) and Pettigrew (1992) have indicated that strategists require different cognitive abilities from everyday management. The strategist is the individual with the cognitive abilities to conceptualise the future of an organisation in a holistic manner so they can identify the long-term strategies that an organisation might follow. Strategists might, or might not, then go on to make strategic decisions that need to be articulated to the organisation and then implemented. Decision-making and implementation, the latter parts of the strategy process, is where leadership and management will come to the fore. The strategist will reflect on the outcome of the strategies adopted and the iterative process of strategy then continues. In terms of cognitive activities, De Wit and Meyer (2005) proposed that there are four general elements: firstly issue identification and sense-making; secondly, diagnosing the structure and causes of issues; thirdly, conceiving solutions to issues; and finally, implementing solutions. The linear structure depicted by De Wit and Meyer (2005) is often iterative, where different 'stages' of the processes occur at irregular intervals. It can be observed on innumerable occasions that implementation can precede any strategic thought. The variation in approaches to management education leads to different examples of the influences upon the cognitive approaches and abilities of managers (Deem 2006; Mintzberg 2004).

Linked to the notion of cognition is the ability of a strategist to sense of complex situations. Strategy is often a 'messy' business and non linear activity (Mintzberg 2004; De Wit 2005). Building upon writers such as Ocasio (1997) practice writers in strategy have highlighted the impact of interpretation on strategic sense-making and action. There are many examples where an individual's strategic perspective is different from another person's. The importance of sense-making in cognition is highlighted by Weick (1995). Perhaps, this draws on the understanding of the world that philosophers such as Plato advocated, where inquiry, abstract reasoning and learning were required skills of leaders (Schwandt 2005). Strategic thinking could be described as sense-making as it could be argued that strategy and strategic thinking resembles many of the characteristics identified by Weick: grounded in identity construction; retrospective; enactive of sensible environment; social; on-going;

focused on and extracted cues and driven by plausibility (Weick 1995). These elements differentiate sense-making from understanding, interpretation and attribution. Liedtka and others (Liedtka and Rosenblum 1996; Liedtka 1998) described the process of shaping strategic conversations. Liedtka places this in the sphere of the strategist and organisational learning. This has resonance with the sense-making and creating (Weick 1995) and the scenario development literature (Courtney 2003; Schwartz 1998; Wack 1985). Strategists could be described as the grand sense-makers.

Analytical ability and intuition

Raimond (1996) and Liedtka (1998) drew our attention to the dichotomy in the literature around analytic and creative aspects in strategy making. A number of writers (Jarzabkowski 2003; Johnson, Smith, Codling 2004; Mintzberg, Lampel, Quinn, and Ghoshal 2003; Mintzberg and Waters 1985; Whittington 1996; 2006) have suggested that actual strategic practice involves both modes of thinking. Analysis assists creativity and creativity supports analysis. Both are necessary for strategic thinking and management.

Several academic authors highlight the importance of intuition in the development of strategy. Intuition is described by Kleinmuntz (1990) as the way managers use their heads rather than formulas. Ohmae (1982) in his seminal text 'The Mind of the Strategists', although set in the context of Japanese management, supported the intuitive perspective. Ohmae did not reject the necessity for analysis, however, Ohmae states, "… successful business strategies result not from rigorous analysis but from a particular state of mind." (p.4) Ohmae considered how strategists can be nurtured to develop a "… group of young 'samurais' …" (p.5) that would not only be the creative and entrepreneurial force in an organisation, but also be the analysts that test, digest, assign priorities and finally implement strategies. Ohmae (1982) believed that individuals who can identify critical issues in organisations are rare. Ohmae also, however, proposed that strategic issue identification can be achieved by applying a systematic approach. This is questioned by a number of contemporary writers (Johnson and Huff 1997; Mintzberg 2004).

Agor (1989) emphasised the unconscious elements in intuitive decision-making. Intuitive decisions are a mix of experience, knowledge, sense-making, character and context. A number of writers propose that normative and intuitive aspects of organisational decision-making should be taken into account (Blattberg and Hoch 1990; Clarke and Mackaness 2001; Einhorn 1972; Kleinmuntz 1990; Papadakis and Barwise 1998; Showers and Chakrin 1981; Spangler 1991). Essentially, an intuitive management decision is based on the judgement of the individual making that decision which requires the organisational context in which that individual is operating and the background of the individual to be taken into account (Clarke and Mackaness 2001). Weick (1995), however, suggested that intuition is compressed expertise which allows managers to make decisions without comprehending the process by which they come to conclusions. Blattberg and Hoch (1990) described intuition as an unquestioning outlook. Some researchers (Jenkins and Johnson 1997) have linked intuition with sense-making in decision-making.

Some support the traditional view that a strategist has to be a rational thinker (Andrews 1971; Isenberg 1984; Langley 1995; Shoemaker and Russo 1993). Writers

such as Langley (1995) have identified a tension between managers when considering whether to develop strategy rationally or intuitively. De Wit and Meyer (2005) suggested that both rationality and intuition are necessary in management thinking. In fact, they suggest that intuitive thinking is better at capturing the bigger picture. It avoids the 'paralysis of analysis' where the exercise of rationality leads to inertia in action (Langley 1995). At the same time it should be realised that intuitive thinking has inherent dangers and is often unreliable. As De Wit and Meyer (2005) state, "Cognitive heuristics are 'quick and dirty' – efficient, but imprecise." (p.34)

Decision-making

Hambrick and Pettigrew (2001) suggested that strategists make strategic decisions. This follows the conventional perspective on strategic management. Others (Porter 2005; Schendel and Hofer 1979) have firmly placed strategic decision-making with chief executive officers. It is argued here, in support of writers such as Pettigrew (1992), that the conceptualisation of strategy is not necessarily undertaken by those making strategic decisions. It could be argued that the division between those that formulate strategy and those that make strategic decisions is an artificial one as both parties will have to conceptualise strategy. What is important is that decisions are made. It might be argued that some strategists just present alternatives for decision-makers, however, there is an amount of research that would suggest that strategists in certain circumstances are also decision-makers.

Communication; influence the communication of culture; stimulating strategic dialogue in an organisation

Several authors have proposed that communication is an essential skill of a strategist. Cummings (2002) and Gill (2006) emphasised the need for strategists to have the ability to stimulate strategic dialogue in organisations. The ability to communicate with different constituencies is often regarded as a particular skill or trait (Bonn 2001). Higgins and McAllaster (2004) suggested that strategic communication can be managed through cultural artefacts such as cars driven by managers, type of computers used by staff (Macintosh or Microsoft).

Ability to influence change

The ability to influence change is closely aligned to the ability to communicate. This is a characteristics that is often identified as a key component of leadership (Hambrick and Pettigrew 2001). Eisenhardt and Zbaracki (1992) emphasised the ability of strategists to gain political influence for their ideas to gain credence and ultimately be enacted. Thus, if the strategist is not the implementer of strategic change, they must be able to at least influence the strategic change agent or leader.

Reflection and Reflexivity

Whipp (1996) criticised the field of strategic management for lacking reflexivity, perhaps as a product of the duality that is observed in the area between academia and practitioners, where the practitioners have little time for "… meaningless navel gazing …" (Pettigrew, Thomas and Whittington, 2002, p.11). Liedtka (1998) was clear in linking strategic thinking and learning. Liedtka stated, " .. a strategic thinker is a learner, rather than a knower. As such, it locates strategic thinking as the outcome of a developmental process." (p.124) The learning organisation has been the mantra of many organisational specialists for many years (De Geus 1988; Senge 1990; 1997). Learning is underpinned by reflection and reflexivity (Pozzebon 2004; Stacey 2007;

Whipp 1996). It is argued by a range of key writers on strategy and strategic management that reflection and reflexive is at the core of being a strategist (See: Bonn 2001; Chung and McLarney 1999; Cummings 2002; Eden 1990; Heracleous 1998; Howard 1989; Kao 1997; Linkow 1999; Mintzberg and Westley 2005; Parston 1986; Pettigrew 1973; Schön 1983; Senge 1990; Senge 1997).

Strategists are thinkers who reflect on situations. The reflective and reflexive processes will be informed by past experience and understanding. What probably differentiates an historian from a strategist is that historians interpret and reflect on the past, whilst the strategist conducts the activities of a historian then articulates a future purpose and direction of an organisation. Strategist should also be reflexive, considering their impact on a particular situation.

Conclusion

It is almost a leap of faith that the reader is asked to accept that strategists exist. It is argued that the characteristics detailed indicate that a strategist has one fundamental over-riding requirement, the ability to be a strategic thinker. This necessitates the ability to: conceptualise strategic issues holistically; with a clear vision of the key issues facing an organisation; to be creative; to have the intellectual ability to make sense out of invariably complex situations; analytical ability; to develop an intuitive capability; to be able to make strategic decisions; and, to influence others through skilful communication and organisational dialogue. The ability for strategists to be reflective and reflexive perhaps underpins all other strategic characteristics or abilities.

The paper does not pretend to have identified all the characteristics that a strategists might possess or which ones are important in particular situations. For example, planning is often associated with strategy and strategic management. Mintzberg and Waters (1985) suggested, however, that strategy does not actually have to be a deliberate process. This paper does not consider where strategists might be located and whether developing strategy is an individual or group activity. This paper also does not assess the effectiveness of characteristics on the performance of the strategist as this is contingent upon the situation in which the strategist is operating. These issues are important and should be considered, however, these are outside of the limitations established at the outset of this work. Clausewitz (1976) believed that what strategists think is linked to how they conceive issues and the context in which their ideas were formed. Context is a construction in the mind of the strategist. Several writers have proposed that the strategist's construction, perception or even vision is influenced by their educational background (Liedtka 1998; Doh 2003). There is a necessity for individuals to learn from their, or others, actions (Parston 1986; Pettigrew 1973; Schön 1983; Senge 1990; 1997). Underpinning the processes of reflection and reflexivity is human cognition.

The characteristics identified in this work have not been compared with leader traits or leadership behaviours identified by numerous studies. The characteristics could be the product of nature (traits) or nurture (behaviours). The characteristics identified are consistent with the definition of a strategist presented in this work. The characteristics are not mutually inclusive. Strategists, however, must have the ability to be holistic, take a long term view and be fundamental thinkers. The terms long term and fundamental are context driven and invariably difficult to finely define. The

other elements are recognised as characteristics that some strategists might possess, but they do not necessarily require them. Arguably, the ability to communicate a strategy to influencers, decision-makers and leaders is necessary. Without this characteristic a strategists will not be able to access those that will implement strategy.

Characteristics are a useful construct for consideration of the identification development of strategists. It is recognised that the characteristics introduced in this work are only a part of the discussion that is required when considering how to ameliorate the performance of, perhaps, the forgotten element in the strategic development of an organisation, the strategist. But at least the identification of some of the key characteristics is a start.

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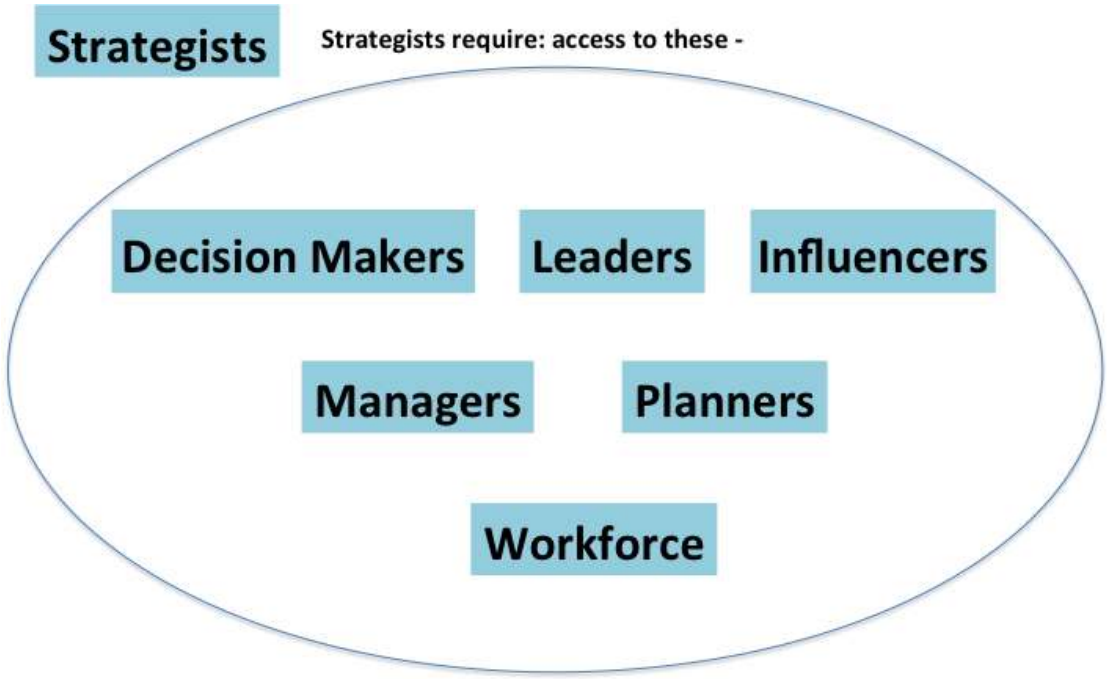
STRATEGISTS & LEADERS: FIGURE

Figure 1: Strategists



STRATEGISTS & LEADERS: TABLE

Table 1: Characteristics of a Strategist

Characteristic	**Reference**
• Holistic thinking	Bonn 2001; Drucker 1954; Hambrick and Fredrickson 2005; Johnson et al. 2005; Kaufman 1991; Liedtka 1998; Linkow 1999; Mintzberg 1994a; Mintzberg 1994b; Ohmae 1982; Senge 1990; Singer 1996; Steiner, Kunin and Kunin 1983; Stacey 1996; Singer 1997
• Clear intent and a vision for the future (long term view); ability to forecast – a fundamental thinker	Beatty and Quinn 2002; Bonn 2001; 2005; Champy and Nohria 2000; Cummings 2002; De Wit and Meyer 2005; Easterby-Smith and Davies 1983; Gill 2006; Howard 1989; Liedtka 1997; Liedtka 1998; Linkow 1999; Lo et al. 1998; Lord 2000; Mintzberg 1994a; Mintzberg 1994b; Mintzberg and Waters 1985; Pellegringo and Carbo 2001; Prahalad and Hamel 1990; Reagan-Circincione et al. 1991; Steiner et al. 1983; Stumpf 1989
• Creative and entrepreneurial thinking (divergent thinking); break from previous patterns of behaviour	Andriopoulos 2003; Bates and Dillard Jr. 1993; Bhide 1994; Bonn 2001; 2005; Chung and McLarney 1999; Cummings 2002; De Bono 1996; De Wit and Meyer 2005; Eden 1990; Ford and Gioia 2000; Goldsmith 1996; Graetz 2002; Heracleous 1998; Howard 1989; Kao 1997; Liedtka 1997; Linkow 1999; Mintzberg 1994a; O'Shannassy 2003; Senge 1990; Stacey 1996; Sun Tzu; Walton 2004
• Cognitive ability and sense-making	Ackroyd 2002; Chung and McLarney 1999; Coulter 2005; Courtney 2003; Daft and Weick 1984; Day and Lord 1992; De Wit and Meyer 2005; Deem 2006; Eden et al. 1990; Fickelstein and Hambrick 1996; Janis 1989; Johnson et al. 2005; Kuhn 1970; Knight et al. 1999; Liedtka 1998; Liedtka and Rosenblum 1996; March and Olsen 1976; Mintzberg 2004; Nadkarni and Narayanan 2007; Nonaka 1991; Noorderhaven 1995; Ocasio 1997; Pettigrew 1992; Pettigrew at al. 2002;

	Plato; Polanyi 1966; Prahalad and Bettis 1986; Schendel and Hofer 1979; Schwandt 2005; Schwenk 1995; Stubbart 1989; Schwenk 1995; Stacey 2007; Walsh 1995; Weick 1995; Whipp 1996; Wright, McMahan and McWilliams 1994
• Decision-making	Hambrick and Pettigrew 2001; Pettigrew 1992; Porter 2005; Schendel and Hofer 1979
• Analytical ability and intuition	Agor 1989; Andrews 1971; Blattberg and Hoch 1990; Bourgeois 1984; Bourgeois 1985; Clarke and Mackaness 2001; De Wit and Meyer 2005; Dutton, Walton, and Abrahamson 1989; Einhorn 1972; Hitt and Tyler 1991; Isenberg 1984; Jarzabkowski 2003; Jenkins and Johnson 1997; Johnson and Huff 1997; Johnson, Smith, Codling 2004; Johnson et al. 2005; Kleinmuntz 1990; Langley 1995; Liedtka 1998; Miller and Ireland 2005; Mintzberg 2004; Mintzberg, Lampel, Quinn, and Ghoshal 2003; Mintzberg and Waters 1985; Ohmae 1982; Papadakis and Barwise 1998; Pearce II et al. 1987; Raimond 1996; Shoemaker and Russo 1993; Showers and Chakrin 1981; Spangler 1991; Weick 1995; Whittington 1996; 2006
• Communication; influence the communication of culture; stimulating strategic dialogue in an organisation •	Bonn 2001; Cummings 2002; Eisenhardt, Kahwajy and Bourgeois 1997; Gill 2006; Higgins and McAllaster 2004; Porter 2005;
• Ability to influence change	Eisenhardt and Zbaracki, 1992; Hambrick and Pettigrew 2001; Pettigrew and Whipp 1991; Schendel and Hofer 1979
• Reflection and reflexivity	Bonn, 2001; Chung and McLarney, 1999; Cummings, 2002; De Geus, 1988; Eden, 1990; Heracleous, 1998; Howard, 1989; Kao, 1997; Liedtka, 1998; Linkow, 1999; Mintzberg and Westley, 2005; Parston, 1986; Pettigrew, 1973; Pettigrew, Thomas and Whittington, 2002; Pozzebon, 2004; Schön, 1983; Senge, 1990; 1997; Stacey 2007; Whipp,

	1996